



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Executive Summary

Week	Number Of Leads	Qualified Leads	Number of Reviews	Send up Volume (case count)	Issued Volume (case count)	Send up Amt	Issued Amt
<i>All product types, advice and execution only</i>							
2014	564	90	87	24	15	€9,783	€5,576
2014 Week 14	55	6	30	1	0	€295	€0
2014 Week 13	51	13	15	0	0	€0	€0
2014 Week 12	48	9	5	3	1	€2,186	€350
2014 Week 11	44	11	9	3	1	€730	€282
2014 Week 10	63	10	5	2	2	€920	€920
2014 Week 9	39	3	6	2	2	€915	€915
2014 Week 8	59	4	1	1	1	€191	€191
2014 Week 7	42	4	3	1	1	€507	€507
2014 Week 6	50	13	2	1	0	€1,122	€0
2014 Week 5	38	6	2	2	2	€519	€519
2014 Week 4	32	4	2	3	2	€635	€477
2014 Week 3	24	3	6	3	1	€955	€605
2014 Week 2	16	4	0	2	2	€809	€809
2014 Week 1	3	0	1	0	0	€0	€0



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014



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Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Week	Send up Volume (case count)	Issued Volume (case count)	Send up Amt	Issued Amt
<i>Execution only products: Over 50's & Simple Life Cover</i>				
2014	1	1	€205	€205
2014 Week 2	1	1	€205	€205

Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Appointment Scheduled	Review Status	Reviews Created	Reviews Completed	Reviews Completed %	Plans From Reviews	Review Conversion %	APE	Average Plan APE
Total		69	45	65.22%	23	51.11%	€9,578	€416
2014 Week14		17	8	47.06%	1	12.50%	€295	€295
2014 Week13		10	5	50.00%	0	0.00%	€0	€0
2014 Week12		7	4	57.14%	1	25.00%	€213	€213
2014 Week11		8	6	75.00%	3	50.00%	€2,131	€710
2014 Week10		4	3	75.00%	4	133.33%	€1,492	€373
2014 Week9		7	6	85.71%	2	33.33%	€915	€458
2014 Week8		1	1	100.00%	1	100.00%	€191	€191
2014 Week7		2	2	100.00%	1	50.00%	€507	€507
2014 Week6		2	1	50.00%	1	100.00%	€1,122	€1122
2014 Week5		3	3	100.00%	2	66.67%	€519	€260
2014 Week4		3	3	100.00%	3	100.00%	€635	€212
2014 Week3		4	2	50.00%	3	150.00%	€955	€318
2014 Week1		1	1	100.00%	1	100.00%	€604	€604
Total		69	45	65.22%	23	51.11%	€9,578	€416

Details of the financial review appointments created during the time period. Of the appointments that resulted in a completed review with customer(s) the associated plan outcomes are shown. APE is the Annual Premium Equivalent. This the total payable in one year on recurring premium plans and 1/10th of single premium amount on single premium plans. Review appointments can be scheduled in advance and those are included here for completeness.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Owner	Review Status	Reviews Created	Reviews Completed	Reviews Completed %	Plans From Reviews	Review Conversion %	APE	Average Plan APE
KBC		54	41	75.93%	22	53.66%	€9,578	€422
Damian Sheridan		44	34	77.27%	22	64.71%	€9,283	€422
Joanne Agnew		10	7	70.00%	0	0.00%	€0	€0
KBC		1	0	0.00%	0	0.00%	€9,578	€0
Linda Moran		1	0	0.00%	0	0.00%	€0	€0
KBC		14	4	28.57%	1	25.00%	€9,578	€295
Joanne Agnew		11	2	18.18%	1	50.00%	€295	€295
Linda Moran		1	0	0.00%	0	0.00%	€0	€0
Nicola Grills		2	2	100.00%	0	0.00%	€0	€0
		69	45	65.22%	23	51.11%	€9,578	€416

Details of the financial review appointments created during the time period. Of the appointments that resulted in a completed review with customer(s) the associated plan outcomes are shown. APE is the Annual Premium Equivalent. This is the total payable in one year on recurring premium plans and 1/10th of single premium amount on single premium plans. A completed review is included where the financial review report is flagged as sent to the customer.

Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Plan Status	Plans	%	Single Premium	Regular Premium (1yr)	APE	Average Plan APE
Sendup	10	43.48%	€0	€4,558	€4,558	€456
Not Available	0	0.00%	€0	€0	€0	€0
Proposal	6	26.09%	€0	€3,637	€3,637	€606
Rejected	4	17.39%	€0	€921	€921	€230
Sales	13	56.52%	€0	€5,020	€5,020	€386
Inforce	13	56.52%	€0	€5,020	€5,020	€386
Total	23	100.00%	€0	€9,578	€9,578	€416

Plan Status is based on the first plan (i.e. lower plan number) related to the completed review. Second and subsequent plans are categorised in 'Not Available'.

Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Product Description	Plans	%	Single Premium	Regular Premium (1yr)	APE	Average Plan APE
Not Available						
	0	0.00%	€0	€0	€0	€0
Protection						
Mortgage Life Insurance	22	95.65%	€0	€8,974	€8,974	€408
Term Life Insurance	1	4.35%	€0	€604	€604	€604
	23	100.00%	€0	€9,578	€9,578	€416

Plan Category is based on the first plan (i.e. lower plan number) related to the completed review. Second and subsequent plans are categorised in 'Not Available'.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Lead Created	Qualified Count	Qualified Rate	Lead Status	Lead Owner	Leads Created
Total	90	15.87%		Total	567
2014 Week 9	3	7.50%			
2014 Week 8	4	6.67%			
2014 Week 7	4	9.52%			
2014 Week 6	13	26.00%			
2014 Week 5	6	15.79%			
2014 Week 4	4	12.50%			
2014 Week 3	3	12.50%			
2014 Week 2	4	25.00%			
2014 Week 14	6	10.91%			
2014 Week 13	13	25.49%			
2014 Week 12	9	18.75%			
2014 Week 11	11	25.00%			
2014 Week 10	10	15.63%			
2014 Week 1	0	0.00%			
Total	90	15.87%		Total	567

The qualification rate over time of the leads created between the dates above is shown here. This can be expanded to show the detailed lead status and current lead owner. Qualification rate is based on all leads recorded on the system in the period.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014



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Lead Owner	Qualified Count	Qualified Rate	Lead Status	Week Lead Created	Leads Created
Total	90	15.87%			567
Aidan Kinsella	24	22.64%			106
Damian Sheridan	58	15.26%			380
Joanne Agnew	3	13.04%			23
KBC	1	5.56%			18
Linda Moran	0	0.00%			3
Nicola Grills	4	10.81%			37
Total	90	15.87%			567

The qualification rate over time of the leads created between the dates above is shown here. This can be expanded to show the detailed lead status and current lead owner. Qualification rate is based on all leads recorded on the system in the period.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Lead Status	Lead Owner	Disqualified	Open	Qualified	Total
Canceled		24	0	0	24
Cannot Contact		194	0	0	194
Contacted		0	21	0	21
Customer Service Query		21	0	0	21
Quote Sent - Future Interest		82	0	0	82
New		0	43	0	43
Qualified		0	0	90	90
No Longer Interested		90	0	0	90
Lost		2	0	0	2
Total		413	64	90	567

Overview of the leads, their current status and their owners. Overview is based on all leads recorded on the system in the period.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Activity Status	Activity Owner	Status Detail	Phone Call	Total
Canceled			1	1
Completed			1,045	1,045
Open			136	136
Total			1,182	1,182

Overview of the system activities, their owners and current status. Overview is based on all activities i.e. phone calls , emails etc. recorded on the system in the period.



Activity and Analysis

Activity between 01 January 2014 and 03 April 2014; as at 03 April 2014

Appendix

If an appointment was created as a result of registered campaign activity it is analysed here by campaign.

Campaign Source Review Status	Reviews Created	Reviews Completed	Reviews Completed %	Plans From Reviews	Review Conversion %	APE	Average Plan APE
Not Known	1	0	0.00%	0	0.00%	€0	€0
Total	1	0	0.00%	0	0.00%	€0	€0

Title refers to the 'Job Role' as recorded in the CRM system. This can be updated by contacting the relevant user administration or emailing ebusiness@irishlife.ie

Job Title Owner	Reviews Created	Reviews Completed	Reviews Completed %	Plans From Reviews	Review Conversion %	APE	Average Plan APE
Tele - Adviser	21	9	42.86%	1	11.11%	€295	€295
Tele - Adviser	4	2	50.00%	0	0.00%	€0	€0
Tele - Advisor	44	34	77.27%	22	64.71%	€9,283	€422
Total	69	45	65.22%	23	51.11%	€9,578	€416

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Activity and Analysis

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Scheduled Week Day of Appointment	Reviews Created	Reviews Completed	Reviews Completed %	Plans From Reviews	Review Conversion %	APE	Average Plan APE
Friday	15	11	73.33%	7	63.64%	€2,185	€312
Monday	7	6	85.71%	3	50.00%	€954	€318
Thursday	5	4	80.00%	2	50.00%	€1,944	€972
Tuesday	22	12	54.55%	5	41.67%	€1,992	€398
Wednesday	20	12	60.00%	6	50.00%	€2,502	€417
Total	69	45	65.22%	23	51.11%	€9,578	€416